

Traction Quarterly Retreat Agenda

Segue

Each person to share three things:

1. Best business and personal news for the quarter
2. What is working and not working in the organisation
3. Expectations for the day - what we want to get out of today

Review previous quarter

Do an analysis of company performance via:

1. Financial analysis
 - a. P&L for the period
 - b. Confirm are we on track / off track
2. [Rock Review](#)

Review the V/TO

[Review the VTO here](#)

Aims are:

1. Help us remember what we're focusing on
2. Ensure there's agreement on what the goals mean

Ben's Insert (Q2, 2017 only)

- Documenting the "Alliance Way" - The Next Step Traction Process
 - Identify our core processes e.g. agree on what they are first (do this today)
 - Sticky note exercise (identify key processes privately first).
 - Document & simplify them
 - Package them in one place (e.g. one source)

[Update the issues list](#)

Draft next quarter's Rocks

These should be written to meet the objectives of the one year plan.

Ben

- Convert Scott's Alliance Sales Process documentation into the agreed "Alliance Way" format.
- Roll out Day Rate billing technically and to clients.

Scott

- Completion of the sales presentation material
- Devise a plan to generate 150K + leads

Andy

- Base budget in Futurly
- Capacity to run scenario planning

Levi

- Write Alliance Way for "Technical Standards"
- Have CI Testing as default for all new projects

Alex

- Write Alliance Way for "Daily Operations"
- Write existing functionality for TT Kanban, make available to staff and request feedback

Tackle key issues (rock level IDS)

Review / Confirm Next Quarter's Rocks

Next steps

Review / Confirm who's doing what.

Administration - set date for next meeting

Conclude

1. feedback on the meeting,
2. whether their expectations were met or not, and
3. their rating on the meeting from 1 to 10.